

***MCO Portal Modifications for HMO and LTC MCO Users --
Member Search and Provider Search***

DHS
10/6/08

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Solution Summary

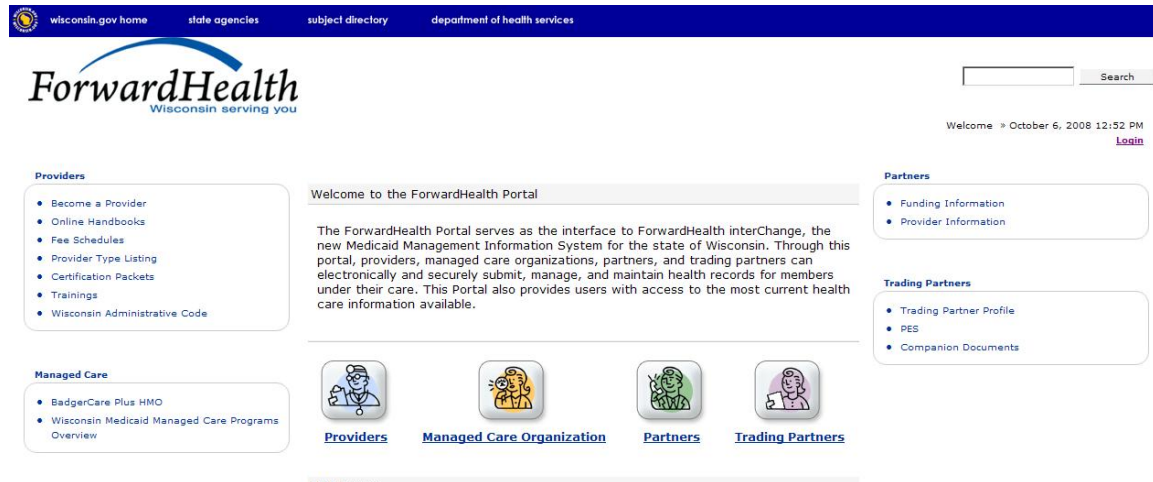
- With the implementation of interChange and the new ForwardHealth Portal, DHS will provide you with the ability to search on member and provider information and return detail screens similar to what you are currently getting using EDSNet screens. Because of the significant differences between the current MMIS and the new interChange system, there is not a one-to-one match between EDSNet screens and the new screens you will be given; however, we believe that these new screens will provide you with the information you have requested.
- Although the screens appear to have "Add", "Save" and "Delete" functionality, these buttons will be disabled for all MCOs. MCOs will only be allowed to "Search", "Clear" a search, and view the results that get displayed on the screens. MCOs will not be allowed to modify data on these screens in any way.

Accessing the Solution

- You will use your MCO portal account to access the Member and Provider information. You do not need a Partner Portal account.
- At implementation, you will be able to assign clerks under your MCO portal account access to the Member and Provider information screens. The screenshots below provide you with specific information on where this information will be found. The "role" that you assign to your clerks or clerk administrators in order for them to access this information will be called "member-prov information".
- You will not be limited on the number of clerks or clerk administrators you can set up, nor will you be limited on the number of clerks or clerk administrators that can be assigned this new role.
- Only Administrators (or Clerk Administrators who have been given authority to set up clerks) can assign the role of "member-prov information" to their clerks. Clerks cannot assign this role to themselves or to other Clerks. See the section below titled "Section 1: Assigning the New 'member-prov information' Role to Your Users".

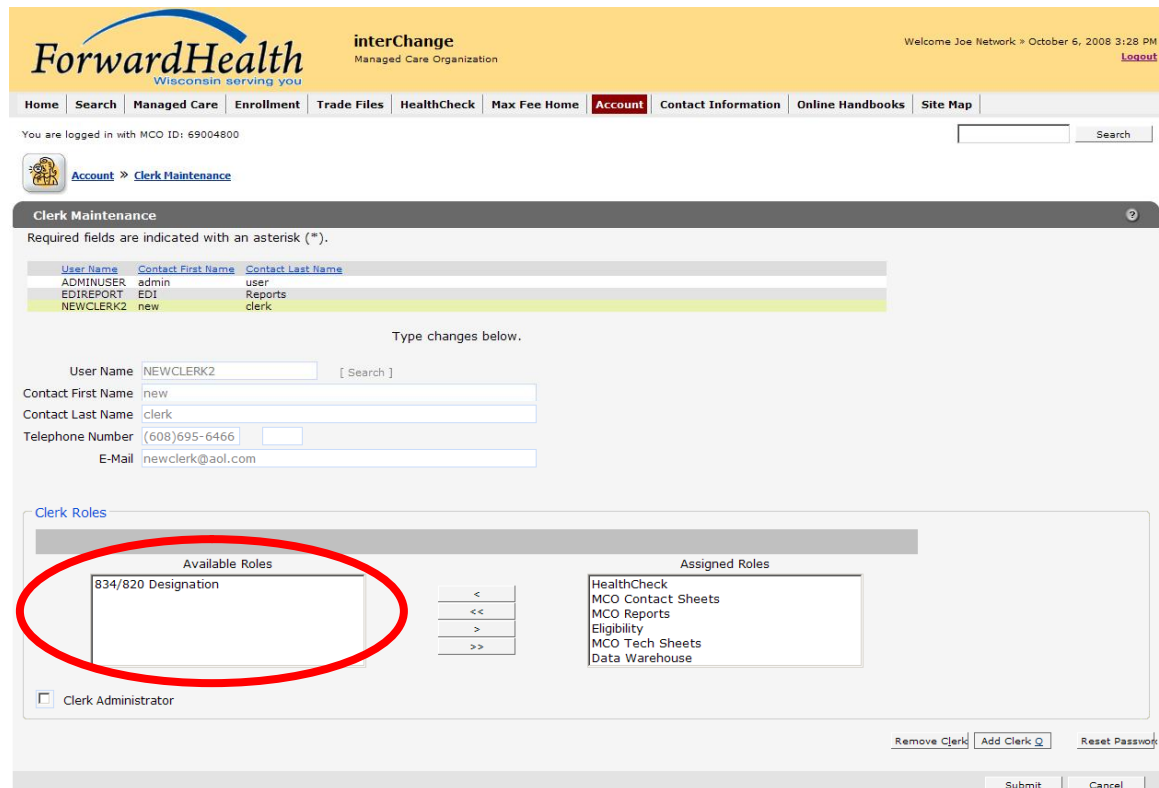
Section 1: Assigning the New “member-prov information” Role to Your Users

The new functionality can be found on the Managed Care Organization Portal.



Administrators and Clerk Administrators can use the Account>>Clerk Maintenance screens to assign the new ‘member-prov information’ role to their clerks.

The new role will appear in the area circled in red in the screenshot below:



Section 2: Member and Provider Search Functionality

Once the role has been assigned to the user, the user can log in and will see a new menu item called "iC Functionality" at the top of their screen.

Clicking on the "iC Functionality" menu will bring up the following options:



[iC Functionality](#)

Member

- [Member Search](#)
- [Member Information](#)

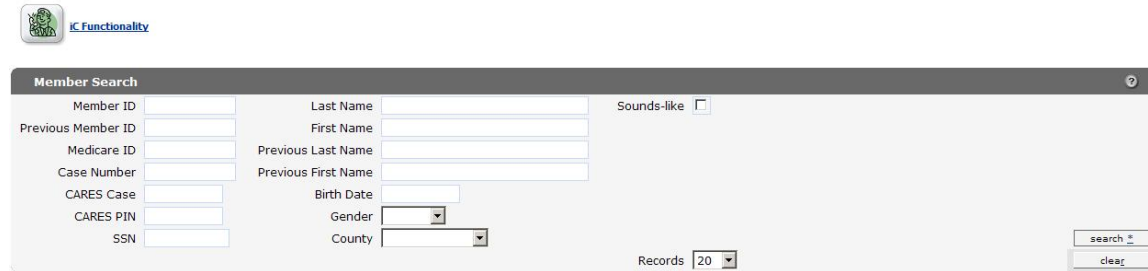
Provider

- [Provider Search](#)
- [Provider Information](#)

Section 3: Member Search Functionality

Member Search

Clicking on "Member Search" will bring up the screen below. As you can see, this screen allows a greater range of options for searching on member information – including a name search and a "sounds-like" search. MCOs are encouraged to narrow their searches by as many fields as possible since search requests that produce too many results will return an error.



The screen below shows an example of the results returned when searching on the last name of "TESTUSER". As you can see at the bottom, there were at least 3 pages of results returned for this search request.

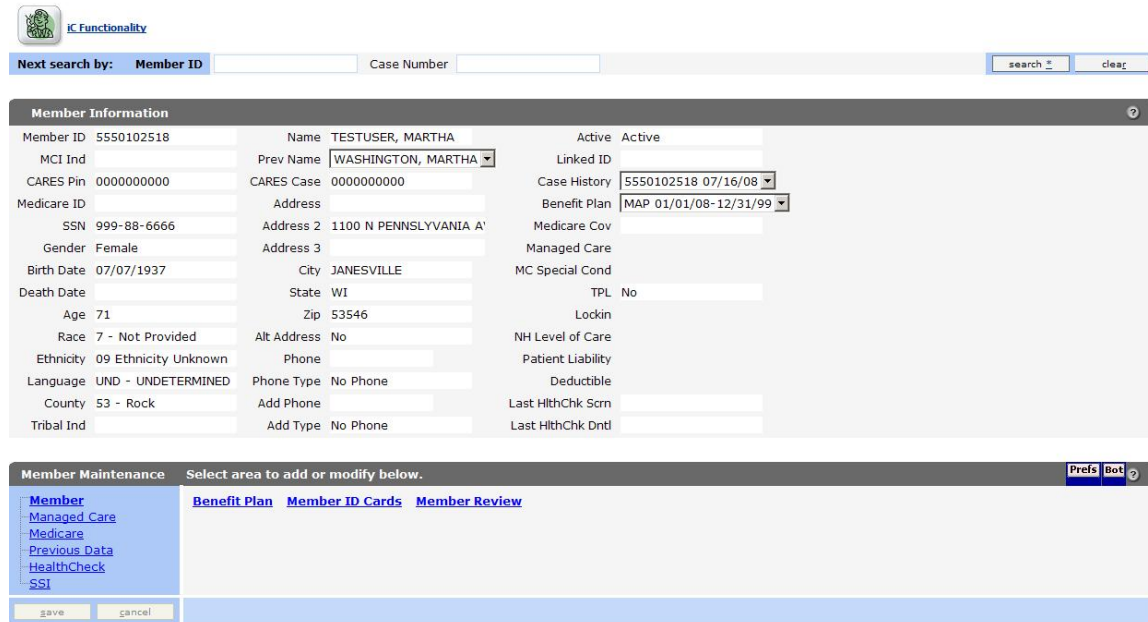


Search Results									
Member ID	Last Name	First Name	MI	Birth Date	SSN	Medicare ID	Gender	County	
9000060192	TESTUSER	PACE		08/22/1942	528-41-7639		M	Milwaukee	
7000063173	TESTUSER	MAWCDC		01/01/1923	755-95-2369		M	Milwaukee	
3000063137	TESTUSER	MEDICAID		01/01/1932	564-56-8956		F	Milwaukee	
5550104002	TESTUSER	MANDATORY		09/19/1980	999-88-9939		F	Milwaukee	
5550102518	TESTUSER	MARTHA		07/07/1937	999-88-6666		F	Rock	
9010000024	TESTUSER	CLAIMSPDB		01/01/1992	998-49-8498		F	Dane	
5550100110	TESTUSER	HISTORIED		01/07/1964	999-88-9929		M	Dane	
8101210989	TESTUSER	TWOENROLL		01/01/1950	786-55-4656		M	Dane	
5550100051	TESTUSER	ELISA		05/25/1990	999-88-9941		F	Dane	
9010000033	TESTUSER	CLAIMSPDK		01/01/1969	784-84-5616		F	Dane	
9010000035	TESTUSER	CLAIMSPDM		01/01/1975	978-84-4656		F	Dane	
6000062761	TESTUSER	TESTA		01/01/1980	456-28-8655		M	Dane	
1000063119	TESTUSER	FOURDATA		01/01/1920	125-47-8965		M	Milwaukee	
9010000032	TESTUSER	CLAIMSPDJ		01/01/1972	745-61-6561		F	Dane	
4000060848	TESTUSER	CLAIMSPD		01/01/1995	415-98-9487		F	Dane	
8000060086	TESTUSER	CAPSPECIAL		12/15/1960	456-79-1257		M	Fond du Lac	
9000059399	TESTUSER	EXTENDED		05/02/1974	541-23-6541		M	Kenosha	
5000063155	TESTUSER	BADGERCARE		01/01/1922	584-98-9848		F	Milwaukee	
8000063182	TESTUSER	MAWCK		01/01/1947	544-86-4545		F	Milwaukee	
9010000034	TESTUSER	CLAIMSPDL		01/01/1999	657-85-4599		F	Dane	

1 2 3 Next >

MCO's must select the row (by clicking on it) to bring up detailed information on the member they are looking for.

Below is an example of the initial information that is provided on the member:



The screenshot displays the MCO Portal interface. At the top, there is a search bar with the text "Next search by: Member ID" and a "search" button. Below this is the "Member Information" section, which contains a grid of fields for member data. The "Member Maintenance" section is at the bottom, featuring a "Select area to add or modify below." prompt and a list of categories: Member, Managed Care, Medicare, Previous Data, HealthCheck, and SSI. The "Member" category is selected, revealing sub-menu options: Benefit Plan, Member ID Cards, and Member Review.

Member Information			
Member ID	5550102518	Name	TESTUSER, MARTHA
MCI Ind		Prev Name	WASHINGTON, MARTHA
CARES Pin	0000000000	CARES Case	0000000000
Medicare ID		Address	
SSN	999-88-6666	Address 2	1100 N PENNSLYVANIA A'
Gender	Female	Address 3	
Birth Date	07/07/1937	City	JANESVILLE
Death Date		State	WI
Age	71	Zip	53546
Race	7 - Not Provided	Alt Address	No
Ethnicity	09 Ethnicity Unknown	Phone	
Language	UND - UNDETERMINED	Phone Type	No Phone
County	53 - Rock	Add Phone	
Tribal Ind		Add Type	No Phone
		Active	Active
		Linked ID	
		Case History	5550102518 07/16/08
		Benefit Plan	MAP 01/01/08-12/31/99
		Medicare Cov	
		Managed Care	
		MC Special Cond	
		TPL	No
		Lockin	
		NH Level of Care	
		Patient Liability	
		Deductible	
		Last HlthChk Scrn	
		Last HlthChk Dntl	

Member Maintenance	
Member Managed Care Medicare Previous Data HealthCheck SSI	Select area to add or modify below. Benefit Plan Member ID Cards Member Review
<input type="button" value="save"/> <input type="button" value="cancel"/>	

The "Member Maintenance" Menu is shown at the bottom of the screen. This allows the user access to more specific information for the member. By clicking the categories on the left (Member, Managed Care, Medicare, etc...) the user will be given sub-menu options to choose from.

In the above example, the category "Member" is selected, which reveals sub-menu items of "Benefit Plan", "Member ID Cards", and "Member Review".

MCOs will only have access to the following "Member Maintenance" Categories:

- Member
- Managed Care
- Medicare
- SSI

MCOs will NOT have access to:

- Previous Data
- HealthCheck

Benefit Plan Information

The sub-menu "Benefit Plan" shows the screens below. If multiple benefit plans had shown up, the user would be able to select them. In the example below, the member only has one benefit plan (MAP).

Note that the Medical Status Code information is also displayed for the Benefit Plan.

Member Maintenance
Select area to add or modify below.

[Member](#)
[Managed Care](#)
[Medicare](#)
[Previous Data](#)
[HealthCheck](#)
[SSI](#)

[Benefit Plan](#)
[Member ID Cards](#)
[Member Review](#)

Base Information

Benefit Plan

Status: Active Only
Benefit Plan:

Benefit Plan	Status	Stop Reason	Plan Type	Financial Payer	Effective Date	End Date	Worker ID
MAP Medicaid Purchase Plan	Active	None	BNFT	1 Medicaid	01/01/2008	12/31/2099	

Benefit Plan: MAP Medicaid Purchase Plan
Effective Date: 01/01/2008

Status: Active
End Date: 12/31/2099

Stop Reason: None

Plan Type: Benefit

Financial Payer: 1 Medicaid
Worker ID:

Medical Status Code Data-

Select row below to update -or- type data below to add.

Medical Status Code	Medical Status Code Effective Date	Medical Status Code End Date	Agency	Site
M3 MAPP >150%, premium	07/11/2008	12/31/2099	Milwaukee - SSI MA / SSA	70

Medical Status Code: M3 MAPP >150%, premium

Medical Status Code: Active

Medical Status Code Effective Date: 07/11/2008

Medical Status Code End Date: 12/31/2099

Agency: 040-70 Milwaukee - SSI MA / SSA

Below is an example of all three sub-menus and their associated screens:

Member Maintenance Select area to add or modify below. Prefs Bot ?

Member
Managed Care
Medicare
Previous Data
HealthCheck
SSI

Benefit Plan **Member ID Cards** **Member Review**

save cancel

Benefit Plan ? A

Status: Active Only Benefit Plan:

search clear

Benefit Plan	Status	Stop Reason	Plan Type	Financial Payer	Effective Date	End Date	Worker ID
MAP Medicaid Purchase Plan	Active	None	BNFT	1 Medicaid	01/01/2008	12/31/2099	

Select row above to update -or- click Add button below.

Benefit Plan: Effective Date:

Status: Active Stop Reason: End Date:

Plan Type: Financial Payer: Worker ID:

delete add

-Medical Status Code Data- Select row below to update -or- type data below to add.

*** No rows found ***

Type data below for new record.

Medical Status Code:

Medical Status Code Status: Active

Medical Status Code Effective Date:

Medical Status Code End Date:

Agency:

delete add

Member ID Cards ? A

Date Issued	Issue Reason	Card Type	Active Indicator	PAN	Source	Return Reason
07/11/2008	Change	ForwardHealth ID Card	Active	1000000000003462	PS/2	00 - Active card, not returned

Select row above to view the data.

Date Issued: Issue Reason:

Card Type: PAN:

Address 1: Source:

Address 2: Active Indicator: Active

Address 3: Return Reason:

City:

State:

Zip:

delete add

Member Review ? A

*** No rows found ***

Select row above to update -or- click Add button below.

Review Reason: Effective Date:

Review Requestor: End Date:

delete add

Managed Care Information

If the "Managed Care" category is chosen, the "Member MCO Enrollment History" screen is displayed to the user, as seen below:

Member Information			
Member ID	5550102518	Name	TESTUSER, MARTHA
MCI Ind		Prev Name	WASHINGTON, MARTHA
CARES Pin	0000000000	CARES Case	0000000000
Medicare ID		Address	
SSN	999-88-6666	Address 2	1100 N PENNSLYVANIA A'
Gender	Female	Address 3	
Birth Date	07/07/1937	City	JANESVILLE
Death Date		State	WI
Age	71	Zip	53546
Race	7 - Not Provided	Alt Address	No
Ethnicity	09 Ethnicity Unknown	Phone	
Language	UND - UNDETERMINED	Phone Type	No Phone
County	53 - Rock	Add Phone	
Tribal Ind		Add Type	No Phone
Active	Active	Linked ID	
Case History	5550102518 07/16/08	Benefit Plan	MAP 01/01/08-12/31/99
Medicare Cov		Managed Care	
MC Special Cond		TPL	No
Lockin		NH Level of Care	
Patient Liability		Deductible	
Last HlthChk Scrn		Last HlthChk Dntl	

Member Maintenance	
Member Managed Care Medicare Previous Data HealthCheck SSI	Select area to add or modify below. Member MCO Enrollment History
<input type="button" value="save"/> <input type="button" value="cancel"/>	

Base Information	
*** No rows found *** Select row above to update -or- click Add button below.	
MCO ID <input type="text"/> MC Program <input type="text"/> MC Service Area <input type="text"/> Start Reason <input type="text"/> Stop Reason <input type="text"/>	Effective Date <input type="text"/> End Date <input type="text"/> Lock-In Date <input type="text"/> Status <input type="text" value="Active"/> Enrollment Source <input type="text"/>
<input type="button" value="add"/>	

MC Special Conditions	
*** No rows found *** Select row above to update -or- click Add button below.	
<input type="button" value="delete"/> <input type="button" value="add"/>	

Medicare Information

If the "Medicare" category is chosen, the 4 Medicare sub-menus are displayed ("Medicare A Coverage", "Medicare B Coverage", Medicare Buy-In A Combined", and "Medicare Buy-in B Combined") sub-menu items are displayed to the user. In the example below, I have selected all sub-menu items in order to show the different fields on all of these screens:

The screenshot displays the 'Member Maintenance' interface with four sub-menus selected: Medicare A Coverage, Medicare B Coverage, Medicare Buy-In A Combined, and Medicare Buy-In B Combined. Each sub-menu shows a 'No rows found' message and a form for adding or updating records.

Member Maintenance Select area to add or modify below. Prefs Bot

Member
Managed Care
Medicare
Previous Data
HealthCheck
SSI

Medicare A Coverage
Medicare Buy-In B Combined

*** No rows found ***
Select row above to update -or- click Add button below.

Retroactive ☐ Effective Date Source
End Date Last Changed Date

Medicare Buy-In B Combined

*** No rows found ***
-Premium Record-- Medicare Part B Premium .
Select row above to update -or- click Add button below.

Source Transaction Process Date
Medicare ID Transaction Date End Date
Member ID Buy-In Enrollment Code Date to CMS

Medicare B Coverage

*** No rows found ***
Select row above to update -or- click Add button below.

Retroactive ☐ Effective Date Source
End Date Last Changed Date

Medicare Buy-In A Combined

*** No rows found ***
-Premium Record-- Medicare Part A Premium .
Select row above to update -or- click Add button below.

Source Transaction [Search] Process Date
Medicare ID Transaction Date End Date
Member ID Date to CMS

SSI Information

If the "SSI" category is chosen, the 6 SSI sub-menus are displayed ("CTS Child Information", "CTS Child Payment", "SSI Enrolled", "SSI Information", "SSI Payment History" and "SSI Unearned Income") sub-menu items are displayed to the user. In the example below, I have selected all sub-menu items in order to show the different fields on all of these

screens:

The screenshot shows a web application interface for "Member Maintenance". On the left is a vertical navigation menu with the following items: Member, Managed Care, Medicare, Previous Data, HealthCheck, and SSI. The "SSI" item is highlighted. To the right of the menu is a main content area with the heading "Select area to add or modify below." and a "Prefs Bot" button in the top right corner. Below the heading, there are six links arranged in two rows: "CTS Child Information", "CTS Child Payment", "SSI Enrollment", "SSI Information", "SSI Payment History", and "SSI Unearned Income". At the bottom of the interface are "save" and "cancel" buttons.

Continued...

MCO Portal Modifications for HMO and LTC MCOs
Member and Provider Search Functionality

CTS Child Information

*** No rows found ***

Select row above to update -or- click Add button below.

CARES Case Number

DOB

Name

MA App Date

SSN

delete

add Q

Retro Payment

-CTS Child Enrollment Data-

*** No rows found ***

Type data below for new record.

delete

add Q

SSI Information

Representative

Payee

Payee Type

Auth 1

Grand Fathered

Competency

Record ID

Deny Code

Optional Elig Date

Appeal Decision

Appeal Code

Essential Person

Death Code

Date Added

Payee Date

Auth 2

Category/Type

SSA District Office

Application Date

Deny Date

Trans Code

Decision Date

Appeal Date

Elig Spouse/Parent SSN

Date Last Updated

CTS Child Payment

*** No rows found ***

SSI Payment History

Financial Cycle Date

Benefit Month

search *

clear

*** No rows found ***

SSI Enrollment

*** No rows found ***

Select row above to update -or- click Add button below.

Medicaid Enrollment

Payment Status

Effective Date

End Date

State Only

State Living Arrangement

Federal Living Arrangement

Jurisdiction State

Jurisdiction County

Federal Gross Amount

Federal Paid Amount

Earned Income Estimate

Self Employed Income Est

Earned Income Exclusion

Work Expense Blind

delete

add Q

SSI UnEarned Income

*** No rows found ***

Select row above to update -or- click Add button below.

Claim ID

Income Amount

Effective Date

End Date

Income Type

Frequency

Validity

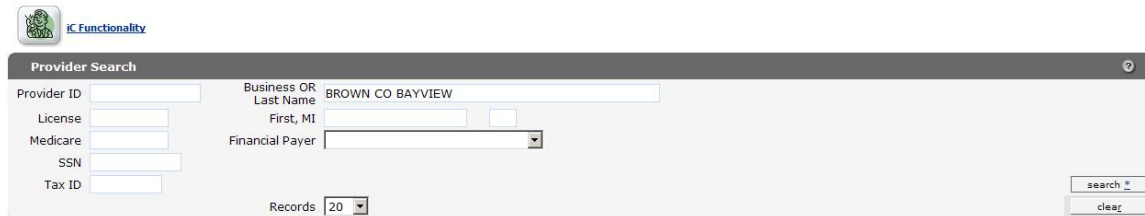
delete

add Q

Section 4: Provider Search Functionality

Provider Search

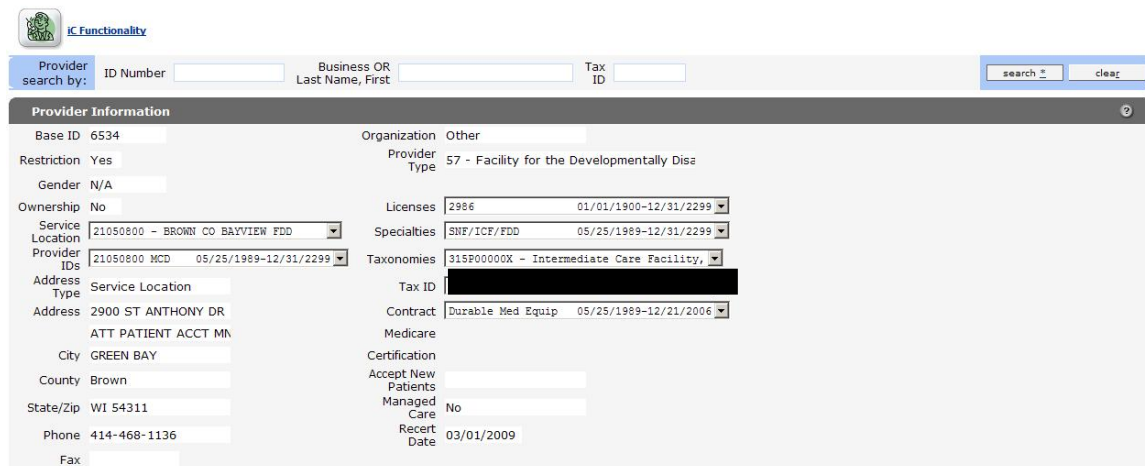
Below is an example of the Provider Search function:



The screenshot shows the 'Provider Search' form. It includes input fields for 'Provider ID', 'License', 'Medicare', 'SSN', and 'Tax ID'. There are also dropdown menus for 'Business OR Last Name' (set to 'BROWN CO BAYVIEW'), 'First, MI', and 'Financial Payer'. A 'Records' dropdown is set to '20'. Search and clear buttons are on the right.

Provider Information

An example of the resulting details screens for the provider record that was found by doing the search:



The screenshot shows the 'Provider Information' form. It displays details for a provider with Base ID 6534. The form is organized into two columns. The left column includes fields for 'Restriction' (Yes), 'Gender' (N/A), 'Ownership' (No), 'Service Location' (21050800 - BROWN CO BAYVIEW FDD), 'Provider IDs' (21050800 MCD 05/25/1989-12/31/2299), 'Address Type' (Service Location), 'Address' (2900 ST ANTHONY DR, ATT PATIENT ACCT MN, GREEN BAY), 'County' (Brown), 'State/Zip' (WI 54311), 'Phone' (414-468-1136), and 'Fax'. The right column includes 'Organization' (Other), 'Provider Type' (57 - Facility for the Developmentally Dis), 'Licenses' (2986 01/01/1900-12/31/2299), 'Specialties' (SNF/ICF/FDD 05/25/1989-12/31/2299), 'Taxonomies' (315P00000X - Intermediate Care Facility), 'Tax ID' (redacted), 'Contract' (Durable Med Equip 05/25/1989-12/21/2006), 'Medicare', 'Certification', 'Accept New Patients', 'Managed Care' (No), and 'Recert Date' (03/01/2009). Search and clear buttons are at the top right.